

**LEARNING ABOUT PARTNERSHIP FROM
THE EXPERIENCE OF EQUAL
DEVELOPMENT AND TRANSNATIONAL
PARTNERSHIPS**

FINAL DRAFT!

PARTNERSHIP BOOKLET

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GLOSSARY

DP	Development Partnership
EC	European Commission
ECDB	EQUAL Common Database
ECTIM	EQUAL Transnational Co-operation Internet Module
ESF	European Social Fund
ETG	European Thematic Group
NSS	National Support Structure
NTN	National Thematic Network
TCA	Transnational Co-operation Agreement

EXECUTIVE SUMMARY

This booklet is designed to offer guidance on the development of successful EQUAL Development and Transnational Partnerships. It is based on the outcomes of a short learning project with a group of eight Development Partnerships who were encouraged to reflect upon their development in order to identify how they dealt with key issues.

The Partnership Learning Cycle

Most partnerships follow a Partnership Learning Cycle that involves five stages:

Preparatory work: involving research into the context in which the partnership seeks to operate; identification of the most appropriate EQUAL theme to address and selecting and engaging potential partners and wider stakeholders that may be useful to the work.

Initiation: agreeing on a common vision, core principles, objectives and goals as well as the different roles and responsibilities that will be undertaken for the implementation of the work.

Development and delivery: establishing and consolidating mechanisms and systems for partnership project work. Ensuring the engagement of all partners and monitoring that tasks are being carried out while managing diversity and ensuring accountability.

Mainstreaming: ensuring that results are sustainable and have long-term impact by developing and building upon linkages with other projects, programmes, networks and institutions at local, national, regional and international levels.

Future action: examining future strategies and identifying potential change actors for carrying this out while working to ensure that outcomes for partnership beneficiaries are sustainable.

Each stage of the cycle feeds into the next and often overlaps with another as different phases are worked through. Of particular importance is the mainstreaming process which is integral to earlier stages. Meanwhile contextual factors constantly impact upon partnerships and accommodating and adapting to these external influences is key to a partnership's sustainability.

General issues across the Partnership Learning Cycle

Throughout the Partnership Learning Cycle a number of issues are important for the success of EQUAL Partnerships. They include:

Context: An awareness that all partnerships are conditioned by the particular environments in which they work and operate best where there is a positive local enabling environment.

Empowerment: Involving disadvantaged groups /beneficiaries, or organisations that represent them, as partners or stakeholders in the development of the partnership's work.

Incentives: An understanding by all partners that complementary objectives can be reached through working together even though organisational aims and approaches may be different.

Trust: Trust is built upon mutual respect and involves a clear understanding of each partner and their reasons for participating in the partnership as well as transparency from each partner in all activities relating to the partnership.

Language: Arriving at common understanding of terms across national language; different sector /organisational languages; EQUAL terminology; culturally sensitive language and partnership language itself.

Innovation: Demonstrating innovation by creative ways of addressing EQUAL themes with fresh approaches or building upon and improving pre-existing methods and tools.

Leadership: Involving people with diverse leadership competencies so that the different partners can jointly tackle challenges while ensuring that leadership roles are transparent and clearly defined and there is an acceptance that these may change over time.

Skills: Using both “hard” and “soft” skills and assessing skills capacity by identifying strengths and weaknesses and identifying where training may be needed in particular areas.

Partnership brokering: Using an internal or external intermediary or facilitator, especially in the early stages. Such a person needs to be trusted by all the partners and requires a range of important qualities and skills.

Support from Managing Authorities and National Support Structures: Developing strong relationships with national EQUAL bodies for the development of the work.

Overcoming obstacles: Problem-solving with an emphasis on open discussion and the adoption of a flexible approach with a willingness to change in order to regenerate the partnership after conflict.

Mainstreaming: Developing contacts and linkages with policy makers throughout the Partnership Learning Cycle so that these can be systematically embedded during the mainstreaming phase.

Flexibility: Being flexible enough to accommodate and adapt to internal and external change and using creative methodology and tools for this.

Time: Appreciating the time needed to build and develop a partnership as well as being aware of different partner timeframes and what conditions them.

Evaluation: Using clear monitoring strategies that measure impact for partners, beneficiaries and EQUAL bodies.

Sharing learning: Capturing and sharing both positive and negative learning partnership experiences through a range of different exchanges, networks and forums.

Successes and challenges during the Partnership Learning Cycle

Stage 1: Preparatory work

This stage is time-consuming and demanding but vital if a partnership is to work effectively. An inclusive approach to the identification of issues and thematic aims is important at this stage, as is practical engagement in project design and development. Allowing ideas to come forward through an open and creative learning process and good early leadership with the authority and command to keep the partnership on track are also crucial to success. Partnerships benefit from exchanging experiences and spending time on team and informal relationship-building in order to help build mutual respect and understanding. Key challenges at this stage include dealing with EQUAL funding rules and regulations; and establishing Transnational Partnerships. Engaging both the private sector and small organisations with limited financial resources as partners is also an issue.

Stage 2: Initiation

As partners come together the promotion of good communication among them is essential. This can be assisted by working to reaching common agreement on key issues; creating a strong organisational structure; focussing partners on practical project tasks and building appropriate tools for the work. Exchanging professional practice across countries and reserving plenty of time for discussion are also important. Key challenges centre on managing early meetings before results are produced; dealing with perceived “self-interests” of partners; setting up new systems to monitor and communicate; dealing with “passenger partners” who lack real commitment to the work and developing successful transnational exchanges.

Stage 3: Development and delivery

At this stage teamwork is reinforced by working towards clear goals within established structures. A sense of “belonging” to the partnership is key and can be achieved through the full participation of all members in activities so that mutual respect and trust are promoted. Challenges include dealing with partners who have financial difficulties and keeping partner representatives involved in non-task-oriented activities. Time is needed to work with diverse sectors and styles that operating at different levels as well as managing organisational differences in power, status and resources. At the same time common solutions need to be found to problems such as wrongly placed personnel and the possible loss of partners.

Stage 4: Mainstreaming

Although mainstreaming is a constant process throughout the Partnership Learning Cycle this stage is specifically about working to spread the learning from project work and integrating it into wider arenas so that it impacts upon the agendas of decision-makers. Strategies for this require intervention and the support of national EQUAL structures is key here. Both personal engagement and good leadership are critical to mainstreaming success.

Stage 5: Further action

Future scenario planning is an important part of the partnership-building process and should include an examination of possible options for the partnership. This includes asking questions about whether the partnership must necessarily persist in its own right; what strategies need to be in place to ensure some form of continuity and who should take responsibility for developing these.

Conclusion

Successful EQUAL Partnerships involve:

Inclusivity: Getting the engagement and participation of all partners through the involvement of all their different contributions in the project work; establishing good working relationships with EQUAL management structures and making sure that beneficiaries are consulted and engaged in the work of the partnership.

Openness and clarity: Allowing ideas to come forward through dialogue, discussion and creative learning processes. Ensuring that the partnership has clear goals and transparent structures and processes that encourage partners, beneficiaries and wider stakeholders to engage with them.

Giving time: Allowing plenty of time for discussion, review and relationship-building with partners, beneficiaries and EQUAL management bodies to help foster mutual respect and understanding – the pre-conditions for trust.

Sharing experience: Through the promotion of an EQUAL Partnership “learning culture” with open exchanges of experience that share what works, and what does not, so that partnerships are offered options for replicating and/or adapting successful models and processes in their work. By establishing and joining wider partnership learning networks and exchanges, the opportunities for enhancing motivation and inspiring other partnerships will provide a lasting and positive impact across the EQUAL programme and beyond.

INTRODUCTION

This booklet is designed to offer guidance on the development of successful EQUAL Development and Transnational Partnerships. It is based on the outcomes of a short learning project with a group of eight Development Partnerships from across Europe. The project aimed to:

- Identify key areas of relevance for the development of successful partnerships
- Explore preliminary learning experiences about partnership
- Make recommendations for other EQUAL partnerships

Through the formation of a **Partnership Learning Group**, DPs were encouraged to reflect upon their development during a Partnership Learning Cycle. This included examining issues and challenges during the stages of preparatory work, initiation, development and delivery, mainstreaming and preparation for future action.

Defining Success

Central to the project was the need to arrive at an understanding of what “success” means for EQUAL partnerships. Who and what define success in this context and how is it measured? The project addressed this issue by seeking to assess the **benefits of a partnership approach** as the best way to achieve EQUAL goals. This involved examining the value and influence of the work of the partnership for:

- **Partner organisations** - how different partners gain from working together in partnership
- **Beneficiaries and stakeholders** - how far outcomes of project activities for target groups and the wider community are recognised as being effective and sustainable
- **Policy level change** – how far project activities are being mainstreamed into employment and social inclusion policies to ensure long-term impact and integration.

Acknowledgement and understanding of “mistakes” and/or “failures” and ensuring that other partnerships learn from these is important in identifying “success” factors. By exploring both what worked, and what did not, the project sought to tease out what specific issues and challenges emerge during the creation and development of EQUAL partnerships and what strategies might work best to deal with these.

Preliminary Learning

The project examined preliminary learning experiences and concentrated on issues that were considered to be of most importance to the DPs involved as they developed their partnerships. As a result the findings are not exhaustive and do not include all possible partnership-building issues and challenges. In addition, as most of the DPs had not embarked upon the mainstreaming stage of their work, exploration was concentrated on the first three stage of the Partnership Learning Cycle – preparatory work, initiation and development and delivery. On-going research that explores future partnership challenges, as well as more detailed investigation into some of the issues raised, will enable greater insight into EQUAL partnerships and contribute to their effectiveness.

THE PARTNERSHIP LEARNING GROUP

The 8 DPs that were chosen to participate in the project came from 7 different countries. The primary aim in choosing them was to ensure that each country that submitted a project was represented, that all the EQUAL pillars were covered and that the partnerships offered wide variety in terms of partner numbers and sectors (see Appendix 1). They included:

Austria: RepaNet - Reparaturnetzwerk Österreich (AT-3-08/135)

Aims to bond social and labour market policy strategies with environmental policy by opening up higher profile fields of business to those segregated from the employment market, particularly in the field of appliance reuse and repair.

Belgium: Décrire (BEfr-20)

Established to assist workers who have suffered collective redundancies in Walloon by offering redeployment guidance and support to assist their reintegration into the labour force. Works principally with trade unions who are key actors in supporting these workers.

France: De la précarité à l'emploi durable (FR-BRE-2001-10825)

Aims to provide an innovative response for the professional insertion of fragile groups into the labour market by working with training centres and a temping company. Priority groups are provided with employment training, literacy and language skills as well as professional support through workshops and sponsored activities.

Ireland: Equal at Work -The Dublin Employment Pact (IE-15)

A Dublin-wide initiative involving 48 partners from different sectors who are working to develop new and more inclusive models of recruitment and in-work progression in order to break entrenched patterns of labour market exclusion and long-term unemployment. They also seek to contribute to the development of an open and diverse employment culture in Dublin.

Ireland: Sonas Development Partnership Ireland Ltd (IE-21)

Aims to improve the quality of life for particular and identifiable groups of asylum seekers at identifiable phases of the asylum determination process and in so doing to contribute to the development of best humanitarian practice. Through outreach services and information provision a better quality of life is promoted for asylum seekers from Eastern Europe, Africa and Asia.

Portugal: Públicos Diferentes. Iguais Oportunidades (PT-2001-310)

Works for a comprehensive approach to difficulties experienced by the most vulnerable groups of the population in entering the labour market with particular emphasis on promoting positive images of socially responsible companies and socially devalued occupations.

Sweden: Diversity in Västernorrland (SE-57)

Seeks to raise the awareness of groups such as senior citizens, disabled people, long-term unemployed, minorities and people with long-term illness and encourage their integration into the labour market in a county with a declining labour supply due to an ageing population and emigration.

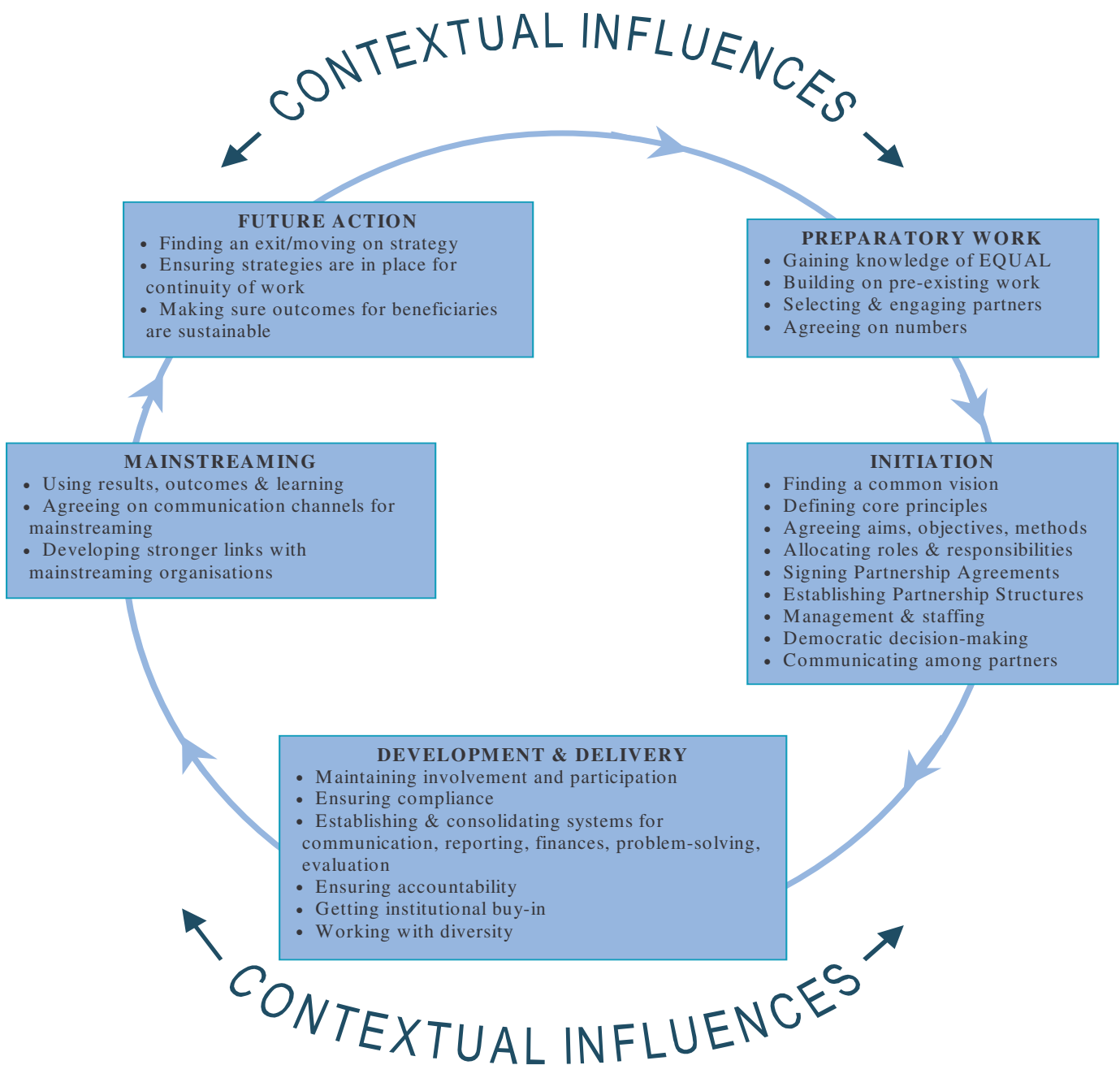
UK: JIVE (Joint Interventions) PARTNERS (UKgb-35)

Works to break down gender segregation in the engineering, construction and technology sectors by developing and piloting new approaches that tackle the multiple barriers preventing women from pursuing careers in these sectors. In particular addressing the need for cultural change in the sectors of education and training.

Central to the project methodology (See Appendix 2) was the use of an **Action Learning Approach** that based inquiry and learning on experience and action, drew on the knowledge and experience of the participants and emphasised reflection and analysis.

THE PARTNERSHIP LEARNING CYCLE

Most partnerships follow a Partnership Learning Cycle that involves five stages – preparatory work, initiation, development and delivery, mainstreaming and future action. Because partnership-building is a process, each stage of the cycle feeds into the next and often overlaps with another as different phases are worked through. Of particular importance in this regard is the mainstreaming process, which, though it is identified as a stage in its own right, is integral to earlier stages. In addition, a range of issues are addressed throughout the cycle such as communication, problem-solving, monitoring and evaluation. Meanwhile contextual factors constantly impact upon partnerships and accommodating and adapting to these external influences is key to a partnership’s sustainability.



Stage 1: Preparatory work

This is a scoping process that involves researching and understanding the contextual case for partnership and drawing on relevant prior experiences. Identifying, selecting and engaging partners by analysing the strengths and weaknesses of potential contributions from different groups is key to this stage. It is also important to identify wider stakeholders and relevant connections to on-going local, national and regional change processes that will inform mainstreaming work from the start.

Stage 2: Initiation

The building stage where partners prepare the ground for working together. Core principles, objectives and goals are agreed upon as well as the different roles and responsibilities that will be undertaken for the implementation of the work. At the same time methods for enhancement of participation of different groups and the establishment of clear structures and open dialogue are important.

Stage 3: Development and delivery

During this stage the partnership begins to develop its work and establishes and consolidates mechanisms and systems in areas such as communication, reporting and evaluating. Ensuring the engagement of all partners and monitoring that tasks are being carried out as agreed is vital. It is also important to maintaining open and critical dialogue as the value and usefulness of a partnership project can be considered from different perspectives. This involves managing diversity and ensuring accountability.

Stage 4: Mainstreaming

This stage builds upon on-going mainstreaming processes by embedding the results of partnership project work and ensuring that its effects have wider economic, political, cultural and organisational impact. A systematic approach is needed to ensure that results are sustainable. This involves developing and building upon linkages with other projects, programmes, networks and institutions at local, national, regional and international levels.

Stage 5: Further action

This is a “moving-on” stage in which decisions are made about what should happen after a partnership has completed its work. This might involve agreement on an appropriate conclusion to a partnership or developing further work. Examining strategies for change and identifying potential “change actors” for carrying this out are important. It is also vital to ensure that outcomes for partnership beneficiaries are sustainable.

GENERAL ISSUES ACROSS THE PARTNERSHIP LEARNING CYCLE

Context

EQUAL Partnerships are developing within a global context in which there is growing recognition that partnerships between different sectors and regions offer the possibility of meeting pressing social challenges. However, it is crucial to acknowledge that all partnerships are conditioned by the particular economic, political, cultural and social environments in which they work. Partnerships appear to be most successful where there is a local enabling environment that encourages their development. This may include positive government policies, supportive legal and regulatory frameworks, the existence of intermediary organisations and/or key individuals who are capable of bringing different institutions together, mechanisms capable of leveraging financial resources, skills and access to information as well as strong incentives to demonstrate the societal benefits that partnerships might bring. Where such environmental factors are limited, or do not exist, partnerships are faced with difficulties that condition their success both nationally and transnationally.

TIP: Closely examine the opportunities and challenges for partnership-building in your particular context!

Empowerment

A central aim of EQUAL Partnerships is to empower disadvantaged groups by combating discrimination and inequality in the labour market and enabling them to work towards this with other stakeholders on an “equal footing”. It is therefore essential that beneficiaries, or organisations that represent them, be involved as partners or stakeholders in the development of their work. Empowerment can also apply to partners themselves, whether they are organisations representing the disadvantaged groups or other types of stakeholder organisation. Partnerships that develop creative relationships with stakeholder groups through dialogue and consultation are likely to be the most successful in supporting the empowerment process. At the same time an open and transparent structure and communication style that encourages beneficiaries to engage with the partnership is important. On-going monitoring through a process of formative evaluation appears to be a useful tool for ensuring empowerment.

TIP: Validate all contributions to the partnership on an equitable basis!

Incentives

Understanding the motivation and organisational expectations of the partnership and its work for different partners is vital to the success of EQUAL Partnerships. This means working to make sure that core partner incentives for participating in the partnership are transparent and clear and are not perceived as “self-interests”. An awareness by all partners that complementary objectives can be reached through working together even though organisational aims and approaches may be different is central to this. Ultimately all partners need to recognise the need for the partnership and the fact that it will provide them with some end result that could not be achieved by one organisation on its own.

TIP: Clearly define who brings what to the partnership and why they wish to work collaboratively!

Trust

Trust is built upon mutual respect. For many partnerships it is the most essential aspect of the process of partnership-building and activities that encourage and assist the development of respect among partners through working together are vital. Because trust is something that grows over time rather than something that can be acquired at the start of a partnership, it is important to ensure that there is a clear understanding of each partner and their reasons for participating in the partnership; transparency from each partner in all activities relating to the partnership and the demonstration of genuine commitment to it. It is also important to bear in mind that although it may be possible to establish relationships of trust between individuals in a partnership it may be a great deal more difficult to do so with the organisations that they represent.

TIP: Ensure that partners work together as openly and transparently as possible in order to build respect - the pre-condition for trust!

Language

Finding a common language is another important issue for partnership-building. EQUAL partnerships involve several different layers of language which include:

- The national language of the country/region in which the DP is situated
- Different sector /organisational languages - jargon used by specific institutions and sectors
- EQUAL terminology – different understanding of terms such as “empowerment”, “equal opportunities” and “innovation”
- Culturally sensitive language
- Partnership language and the use of value-laden terms which each partner/individual representative interprets differently e.g. trust, equality

Those working within a partnership need to be sensitive to these strands and seek clarity in their use of language so that all partners can understand what is meant by a specific term and there are no hidden meanings that can be misinterpreted.

TIP: Build a common language together by developing your own partnership glossary!

Innovation

EQUAL strongly promotes innovation by encouraging the exploration and testing of new and creative approaches at all stages of the Partnership Learning Cycle. All the DPs involved in the project showed examples of some form of innovation in their work. Newly-formed partnerships manifested creative ways of addressing EQUAL themes with fresh approaches that emphasised the importance of ideas while others built upon, and improved, pre-existing methods, tools and approaches for their work.

TIP: Take risks – if you are unsuccessful you can learn and grow from the experience!

Leadership

Clear leadership is perceived as vital for EQUAL partnerships but it raises a number of issues in relation to its style and exercise in view of the equitable basis of collaboration upon which partnerships are founded. Leadership of a DP depends upon a range of factors including contextual issues, partnership type and size, the EQUAL theme being addressed, the urgency of the required action and the personalities of those involved in its development. In some cases EQUAL requirements at a national level influence leadership dynamics within the

partnership. For example, in some Member States DPs are required to nominate a ‘lead partner’ to act as the accountable body for the project while in others more devolved and flexible arrangements are encouraged. Finances also impact upon the issue of leadership in that large organisations that bring such resources to the partnership are often perceived as those with most power even though smaller groupings may have better ‘leadership credentials’. Ideally, partnerships will include people with diverse leadership competencies so that the different partners can jointly tackle challenges. It is also important that leadership roles are transparent and clearly defined so that expectations of them are shared and understood by all partners with an acceptance that these may change over time.

TIP: Don’t be afraid of leadership – accept that it will change over time and develop processes to allow all partners to contribute towards it!

Skills

In order to work successfully partnerships rely upon a range of important skills. As well as “hard” technical skills they include a range of “soft” skills, including interpersonal and team-building abilities, that are less visible but just as important to the development of partnership activities. Some of the core skills identified by the project for partnership-building included good communication; leadership; building relationships, capacity-building, problem-solving, facilitating; planning and being both persuasive and sympathetic. As different individuals bring skills and competencies to the partnership, these may be drawn upon during the course of the partnership while others may need to be acquired. Partnerships should assess their skills capacity by identifying strengths and weaknesses and ascertaining whether external training may be needed in particular areas.

TIP: Use the partnership to share your skills and capacity-build others!

Partnership brokering

Partnerships often rely upon someone to act as an intermediary or facilitator during their work, especially in the early stages. This role has been described as that of a “partnership broker” who develops relationships between parties and carries out the “behind the scenes” work to create and build the partnership. This person may be a member of the initiating organisation’s staff or an external consultant/facilitator. A good partnership broker needs to be trusted by all the partners and requires a range of qualities and skills that include a clear understanding of the DP and the context in which it operates and a commitment to it; professional detachment; experience of working with different sectors; good communication and language skills with an ability to listen; personal engagement; imagination and honesty.

TIP: Choose a partnership broker with personal integrity and a willingness to listen!

Support from Managing Authorities and National Support Structures

A key role throughout the development of EQUAL Partnerships is played by EQUAL Managing Authorities and National Support Structures. Being able to access and draw upon advice and information from these bodies is important in encouraging and promoting partnerships throughout their development. As well as linking partnerships together through the co-ordination of EQUAL information nationally, additional useful support is provided by regular meetings or telephone contact; tips about other DP or EC projects from which learning might be gained; the organisation of national workshops where informal contacts and

networks within EQUAL can be developed and information about national/international events or individuals that might be of interest in relation to a particular issue or theme.

TIP: Confide in and build relationships with Managing Authorities and National Support Structures!

Overcoming obstacles

EQUAL partnerships face a range of obstacles throughout their development. Although key challenges are identified at each stage of the Partnership Learning Cycle, they can generally be overcome by:

- Encouraging open discussion and using dialogue and communication to clear the air
- Dedicating time to solving the problem
- Ensuring that the partnership is adequately and suitably staffed
- Being aware of possible problems that may arise and solutions and methods to address them – a good evaluation system may be helpful for this
- Drawing on the balance of partners and partnership structures – size, strength etc
- Ensuring all partners have equal visibility within partnership
- Becoming skilled as good moderators
- Using a mediation process if necessary
- Adopting a flexible approach with a willingness to change in order to regenerate the partnership after conflict

TIP: Heighten awareness of the strength of the partnership so that partners are convinced that working together is better than working individually and that all partners are equal within it – though not so outside it!

Mainstreaming

EQUAL Partnerships are encouraged to develop and test new ways of integrating good practice into employment and social inclusion policies. This involves developing contacts and linkages with policy makers and advisory and implementing bodies throughout the Partnership Learning Cycle so that these can be systematically embedded during the mainstreaming phase. Sharing mainstreaming strategies at all levels is also important for ensuring the long-term impact of partnership work.

TIP: Integrate mainstreaming into your work right from the start!

Flexibility

Change inevitably impacts upon EQUAL Partnerships and it is important that they are organised flexibly enough to accommodate and adapt to this as they develop. Change may occur internally, as a result of staff changes, or externally, due to the effect of wider contextual influences. Dealing with change involves being creative with methodology and tools as well as including different forms of capacity-building within both the partnership and partner organisations so that individuals and the institutions that they represent are equipped to withstand change.

TIP: Always keep open the possibility of changing and revising objectives and methodologies as you develop your partnership!

Time

An appreciation of the time needed to build and develop a partnership is a fundamental necessity. Time spent in discussion and revision as well as getting to know each partner and their representatives was highlighted as a consideration that should never be underestimated. The project found that the DPs work under considerable time pressures and would have liked more time for delivery and experimentation. An awareness of different partner timeframes, and what conditions them, so that the partnership can somehow take these on board is also necessary. These might include public institutions working within election schedules, tight private sector targets and NGO time scales for reporting to donors.

TIP: Take time – it’s almost never too late!

Evaluation

Most EQUAL Partnerships have developed and/or conducted their own evaluation and monitoring strategies. As evaluation is so strongly linked to mainstreaming it is vital that clear and co-ordinated forms for on-going review and monitoring exist throughout the learning cycle. Choices need to be made about both internal and external monitoring strategies in response to the needs of partners, beneficiaries and EQUAL bodies.

TIP: Permanently evaluate the progress of the work!

Sharing learning

Learning from the development of EQUAL Partnerships needs to be more rigorously captured and shared. Such learning needs to be frank and open and failures discussed as much as successes. Throughout the project it was agreed that the strongest partnerships are those that have been most open to learning from mistakes. It was also clear that partnerships benefit enormously from being part of learning networks and thematic groups where both positive and negative experiences are shared. Although this is currently in place nationally across EQUAL pillars through Thematic Working Groups, it was felt that wider opportunities should exist for connections at national, regional and transnational levels with scope for DPs to meet and/communicate on a regular basis to discuss their work.

TIP: Share experiences – good or bad – to create an EQUAL Partnership learning culture!

STAGE 1: PREPARATORY WORK

Getting the basics right

“The preparatory work is not just the first – it is the most important.”

This is considered to be the most important stage for the development of a solid and effective partnership. It involves careful research into the context in which the partnership seeks to operate and identification of the most appropriate EQUAL theme to address. A clear understanding of EQUAL is important for this process, as is an examination of prior partnership experiences in the chosen area. Selecting and engaging potential partners is central to this stage but time also needs to be spent in identifying wider stakeholders that may be useful to the project work as it develops.

WHAT WORKS BEST AT THIS STAGE

- **An inclusive approach to identification of issues and thematic aims**
- **Practical engagement in project design and development**
- **Allowing ideas to come forward through an open and creative learning process**
- **Good early leadership with the authority and command to keep the partnership on track**
- **Exchanging experiences with other partnerships**
- **Time spent on team and informal relationship-building in order to help build mutual respect and understanding**

KEY CHALLENGES

- **Dealing with EQUAL funding rules and regulations**
- **Establishing Transnational Partnerships**
- **Encouraging small organisations and those with limited financial resources to become partners**
- **Engaging the private sector as a partner**
- **The demanding and time-consuming nature of the work**

CHECKLIST OF KEY ISSUES TO ADDRESS

Knowledge of EQUAL

Information about EQUAL and a clear understanding of its aims and how it works (including strategy and operations) is important for preparatory work. This is particularly so for funding rules and regulations. Handbooks, workshops and regular meetings/personal contact with the EQUAL Managing Authority and National Support Structure representatives are helpful for this, as is experience of working on similar projects on the EQUAL themes and with the EC.

INITIAL EQUAL SUPPORT

Sweden: Diversity in Västernorrland

The Swedish ESF Council (EQUAL Managing Authority) assisted with:

- Questions on the application working process
- Discussion and support when choosing transnational partners
- Education and support on financial issues

Researching and reviewing the context

Preparing the ground for the establishment of a partnership involves researching and reviewing the particular context in which it intends to work and identifying key issues that might be tackled under EQUAL. This necessitates:

- Careful examination of both the rationale for the partnership and beneficiary needs
- Identifying potential partners and stakeholders – especially those that may be helpful in mainstreaming the partnership and assisting with outreach possibilities that can spread its message e.g. policy audiences in national or regional government
- Identifying wider resources for the partnership – both financial and non-cash (skills, ideas, physical space, equipment etc).
- Assessing prior experience through links with appropriate organisations and networks that have a long working history in an area and the identification of partnerships that already exist around similar themes - in many cases DPs are able to adapt to the work of an existing partnership, organisation or project.

TIP: Use specific contextual triggers to promote working in partnership —policy initiatives, leadership programmes, social or corporate changes are all potential partnership-building opportunities!

Building on pre-existing work or partnerships

Many EQUAL Partnerships adapt to pre-existing partnerships or build upon connections and networks with organisations that they know well and have worked with previously.

Advantages:

- There is a shared understanding of many of the issues involved
- Objectives can more easily be reached because partners know one another, are aware of how they work and one another's reliability
- Strong local connections and practices can more easily be built upon at regional level
- Strong thematic networks can be created
- Trust is more easily built when pre-established relationships exist

Disadvantages:

- There is no input of fresh ideas, new modes of organisation or working methodologies
- Making the appropriate links and connections is time-consuming
- It can be costly as it involves using internal resources to establish connections
- A genuinely common project may be difficult to arrive at as partners who were not “original” members may feel marginalized

BUILDING ON PRIOR KNOWLEDGE & EXPERIENCE OF WORKING IN PARTNERSHIP

Austria: RepaNet

ARGE Muellvermeidung (Association for Waste Prevention) is the co-ordinating partner of the DP RepaNet. It is an NGO and well-known networking organisation which was founded 1982 to create new employment opportunities in the environmental sector. Between 1995-2000 ARGE was project coordinator for two ADAPT-projects and an EMPLOYMENT-project (the forerunner programmes of EQUAL). EQUAL was the challenge to create an unprecedented network in the waste management scene in Austria. ARGE selected the topic (repair services a new trend in the environmental sector in Austria) and chose all potential partners. A large number of NGOs were selected for their regional good practice. National level organisations were chosen for their mainstreaming potential and included the Federal Ministry for Environment, the Chamber of Commerce and the Union of Salaried Private Sector Employees (both had existing departments for environmental affairs with proactive officials), and the national Association for Waste Management (of which all Austrian municipalities are members).

Belgium: Décrire

DÉCRIRE was established from an existing partnership between three organisations: The FOREM (the public employment organisation for employment and training in the Walloon Region) which has worked with unemployed people within the framework of collective redundancies in the Walloon region for 25 years, always in partnership with Trade Union Organisations and sometimes Trade and Industry Organisations. CAREMPOI - a Trade Union Partnership that had worked previously with the FOREM on programmes for the social and professional reinsertion of people made redundant after an industrial closure. CEFRET (Centre de Formation Textile – Training Centre for the Textile Industry) - a partnership between a Trade Union from the Textile Industry and the Textile Trade and Industry Organisation which aims to retain former workers within the textile sector by offering them the opportunity to retrain, adapt to new techniques and be relocated. The Université Libre de Bruxelles joined as a new partner. It undertakes academic research on redeployment.

UK: JIVE (Intervention) PARTNERS, UK

The drive for the project came from an existing partnership of two organisations (Lets TWIST) that was set up following a successful ESF NOW project. One of these partners became the lead partner in JIVE Partners The project grew from a basic desire to role out the work that had been carried out on a regional basis by Lets TWIST into the national arena and a need to have “test bed” organisations. The broad framework of the project was already in existence before the establishment of the partnership. Some modifications were made in discussion with one of the partners from an NGO with whom we had strong ideological links. These three organisations became the Core Management group, the NGO acting as an umbrella for the other NGO's interested in joining the partnership. We also wrote all aspects of the bid together.

Starting a new partnership

Many new partnerships are created to carry out EQUAL work.

Advantages:

- Fresh and more innovative approaches to issues, projects and methodologies
- A diversity of ideas with the possibility of developing many different projects involving target groups.
- New contacts and knowledge are built
- Individuals and partners get to know each other well through the process of starting from scratch

Disadvantages:

- Difficult to arrive at a common approach
- Trust-building takes longer
- Very demanding in terms of both work and length of time needed to get things started

STARTING A NEW PARTNERSHIP

Sweden: Diversity in Västernorrland

In July 2000 an informal 6-member working group was established from a first meeting of twenty organisations. It included an Association of Local Authorities, two County Boards, two NGOs and a Regional Social Insurance Office. A project leader was employed to establishing the partnership process by drawing up an inventory of ideas from all the county's municipalities where the EQUAL-idea was introduced. The first inventory involved about two hundred people. In May 2001, a one-day meeting was held with fifty participants who were invited to brainstorm EQUAL-ideas. The start was based on ideas and there were no discussions at this stage about a possible partnership. About thirty ideas were outlined in detail from which twelve were selected as real EQUAL-projects. In the end seven of these were financed and realised. During this time the fourteen partners for the DP were gradually engaged. Some of them emerged naturally as they were responsible for the issues and target groups that the ideas/projects dealt with while others were engaged as financial partners without direct project involvement. Parallel with this work many local and regional authorities, municipalities and organisations were involved in a process to get a vision for the whole county. This centred on diversity and thus supported our EQUAL-process.

TIP: Take time to think and experiment when starting a new partnership!

Identifying and selecting partners

Identifying and agreeing on the "right" players to bring into the partnership is a key to preparatory work. An assessment of the risks and rewards of being involved in a partnership is important for each partner to undertake. It also involves analysing different potential partner strengths and weaknesses and is especially important if the partnership is not building on a pre-existing partnership or contacts with known organisations. Careful partner selection is important:

- To make partnership relevant
- To enable effective working relationships
- To minimise risks
- To ensure that partnership activities are sustainable
- To capitalise on potential mainstreaming possibilities

KEY QUESTIONS TO ASK WHEN IDENTIFYING POTENTIAL PARTNERS

Reputation: Can and will they deliver? Have they had previous experience of European programme work?

Legitimacy: Are the organisations empowered by their members/stakeholders/management boards to make decisions on issues regarding the work of the partnership? Do the individuals that represent them have the authority to act on their behalf?

Capacity: Do they have the capacity to make decisions within the partnership and is their organisation sustainable?

Skills and resources: What can they offer? Do they have solid skills and resources (cash/non-cash?)

Complementarity: Do the skills and resources that they can offer provide the partnership with something to fill a gap and assist its work – something that others cannot provide?

Mainstreaming: Are policy makers and beneficiaries well-represented/linked into the partnership so that its impact will be long lasting?

Motivation: Do they view partnership as a way forward? Are they motivated to work in partnership?

TIP: Check that potential partners show excitement and interest in joining the partnership so that there is enthusiasm and commitment to make it work!

Checking on resources

All partners will have a selection of different human and financial resources that they can bring to the partnership. These may include information; physical space; products; expertise; skills, relationships; people and money. The partnership needs to decide which of these are required for its work and which potential partner can best bring these to the table. This may involve a resource mapping exercise in which partners share what they feel they are best equipped to offer the partnership.

TIP: Balance the power of finance by experience, skills and knowledge!

Agreeing on numbers

EQUAL DPs vary enormously in size. In the learning group one DP had as few as 4 partners while another had more than 40. Many DPs choose to limit the number of partners involved in their work in order to ensure easy management and smoother relationships. They also feel that it is easier to get to know and work with one another and trust is more easily established. Larger partnerships however feel strongly that by bringing together a wide range of organisations that do not usually work together they are able to secure a greater variety of distinct and complementary resources, be more innovative by drawing on a wider range of ideas and obtain good mainstreaming potential as their work develops.

AGREEING ON NUMBERS

Belgium: Décrire (4 partners)

We agreed to put a limit to the number of members in our DP at this stage because objectives and actions were clearly pinpointed and each partner agreed to be in charge of action in the field of their competencies.

Ireland: Equal at Work -The Dublin Employment Pact (48 Partners)

No limit on numbers was planned. On the contrary, the project from the start was intent on achieving an impact across the three sectors of the Dublin labour market (inherent mainstreaming effect), so partners from different sectors and different geographical areas of the region were actively canvassed from the start. The core of the partnership was formed by existing partners. Workshops developing the theme for the EQUAL application then identified further partners that it would be beneficial to involve. These were then approached and asked to join the initiative on the basis of the outline proposal underlying the application. Of the 48 partners involved in the DP, the initial core consisted of 10. Approximately 34 partners were involved in completing the application and fleshing out the details of each site work plan. The final partners were then brought on board “locally” by the established sites.

Engaging Partners

An acknowledgment of the different skills bases, competencies and resources that each partner brings to the partnership is important in engaging partners. A balanced set of contributions from the different partners where each resource is valued for its complementarity and potential partners feel accepted on an equitable basis is important. This involves arriving at what the Equal at Work - Dublin Employment Pact DP describes as a “win-win formula” in which “the sum of mutual gain is greater than immediate individual gain”. It is particularly important for NGOs and/or small organisations to feel that they are accepted on an equitable basis as they may feel constrained in their ability to become credible

partners because of financial and skills limitations. At times some form of capacity-building may be necessary to support their inclusion in the partnership. This needs to be addressed carefully as it is not an easy process and can sidetrack from the main partnership agenda.

The easiest partners to engage are usually those who:

- Are closest to the problems being tackled by EQUAL
- Lack the resources to undertake initiatives they know are required
- The initiating organisation has common ground with
- Function well internally
- Have financial capacity

Partners that are more difficult to involve include those who:

- Need convincing of the value of the partnership
- Have strong political/bureaucratic cultures e.g. state agencies
- Are threatened by the partnership's objectives
- Lack confidence and/or partnership experience
- Come from the private sector
- Have funding difficulties
- Are inflexible and have set objectives
- Find funding rules and regulations difficult to work with

METHODS OF ENCOURAGING ENGAGEMENT

Engaging partners, especially reluctant ones, involves careful work. Possible methods for this include:

- Encourage discussion and open dialogue about the partnership and its aims whenever possible
- Reinforce contacts and identify key people in partner organisations who can encourage involvement
- Hold initial workshops on the scope and theme of what is being proposed
- Hold regular meetings to explain the aims of the partnership
- Carry out visits to partner organisations to present the project
- Use a facilitator to moderate the discussion process and move people along to common ground.
- Dedicate a staff member from the initiating organisation to work with a particular partner
- Learn about and get to know potential partner organisations well
- Establish good informal relationships with partner representatives
- Engage good mainstreaming partners at the start e.g. government & national bodies
- Have a focus/goal to encourage partner engagement -often a single clear issue works best

TIP: Explain the project and its aims over and over again in order to get understanding and buy-in - "it is a never ending job."

Engaging the private sector as an EQUAL partner

The sector that appears to participate least in EQUAL Partnerships is the private sector. Business engagement in EQUAL Partnerships is important because of the potential for developing labour force skills that employers need within the community and contribution to local job creation. Through involvement in partnerships the private sector can also maximise positive economic, social and environmental impacts.

METHODS FOR PROMOTING BUSINESS ENGAGEMENT

- Highlight legal obligations
- Use examples of companies that have benefited from collaboration in partnerships
- Seek senior management buy-in for a partnership project
- Demonstrate how business can gain positive publicity and mainstreaming links with wider society
- Draw on arguments from global corporate citizenship movement that show benefits of business engagement in societal issues

TIP: Show that cross-sector partnerships make good business sense by benefiting both shareholders and stakeholders!

Transnational Partnerships

Locating good transnational partners appears largely to be a matter of luck. DPs are keen to find a more “friendly” way to find partners than through the use of the EQUAL Transnational Co-operation Internet Module (ECTIM); a computer module linked to the EQUAL Common Database (ECDB) that facilitates the Managing Authorities of Member states to approve a Transnational Co-operation Agreement (TCA). It is helpful to be able to identify partners early and then develop detailed proposals in tandem. Transnational work appears to be complicated by the fact that due to national differences projects end at different times which has a negative impact on work programmes. There are also a number of difficulties relating to different cultural approaches to work that emerge more strongly in later stages of the Partnership Learning Cycle.

SELECTING TRANSNATIONAL PARTNERS

Ireland: Equal at Work – The Dublin Employment Pact

Initial contacts were made through existing contacts (EUROCITIES, MetroNet etc.) as we had a set of criteria for preferred partners (key labour market actors with regional impact in large urban centres). Also, through a workshop in MetroNet prior to Action 1 we developed a model TCA with aims and objectives. None of the initial intended partners were successful in their bids, and new partners were found using the Commission online database. Nevertheless the model developed in MetroNet was introduced to this transnational circle and accepted. The partners included two who failed to proceed to Round 2, which was bad luck. However we were ultimately successful regarding our “criteria” and found the partners as defined.

UK: JIVE (Intervention) PARTNERS

This was a lengthy process as we wanted to ensure all partners could have a real and constructive input in to the transnational activities. We also wanted to be sure that we could learn from the partnership. We chose partners off the website and scrutinised their DP activities. We knew some of them from previous partnerships and transnational networking on previous funding rounds. We participated in face-to-face meetings with them to hear in more detail about their projects. This was very useful as we learnt more than from the website where details are limited and translation does not always convey 'true' meaning.

Improving methods of selecting transnational partners include:

- Thinking very carefully about who is the right partner and why
- Holding face to face meetings to learn about potential partners in more detail
- Using professional academic researchers to locate partners
- Using individual facilitation from within potential partners
- Using existing contacts with a clear set of preferred criteria
- Holding workshops to develop a model TCA

Dealing with initial difficulties

During the preparatory stage a number of obstacles may be encountered. These might relate to the external constraints of the environment in which the partnership seeks to work; pre-conceived attitudes towards different potential partners; lack of partnership-building skills and different organisational priorities that impede adequate support for the proposed partnership. Most of these challenges can be overcome through hard work and commitment and addressing them directly can serve as a catalyst for developing new and dynamic ways of working together.

OVERCOMING EARLY OBSTACLES

Ireland: Sonas DP Ltd.

Our early difficulties arose when the partnership model was applied – everyone was equal and had an equal say. This made it difficult as without clear leadership there was an undercurrent of ‘positioning’ and seeking to ensure individual outcomes in the preparatory and planning stages. This was solved by using an external facilitator to help find a common and agreeable set of goals and procedures. Change also came with the involvement of three representatives at a first transnational meeting which seemed a great deal more advanced than our DP. We also spent a lot of time together which gave us an insight into the commitment and dedication of each and was useful in building respect and resolve to get things moving when we got home. This was the catalyst to bind the entire DP into a more decisive and action-led group. By seizing the initiative, this group led the others both by example and a sense of urgency to arrive together at agreed goals and timeframes. After that the meetings of the DP became more focussed and cohesive and the roles of all of the members took on a new sense of ownership.

UK: JIVE (Intervention) PARTNERS

The NGOs we chose to work with were all very under resourced organisations and the development of the DP was overshadowed by a worry that they would not find match funding. Valuable time was spent unsuccessfully trying to assist them with this. To support the NGOs the lead partner gave intensive support around the financial problems encountered. A varied intervention rate gave them time to build up a different profile in their region to attract funding. As a result two of the organisations managed but it is still a problem for one other. The financial insecurity of all the NGOs has been a constant thread throughout the project and hindered some of its potential and activities.

STAGE 1: SUMMARY OF SKILLS AND RESOURCES

KEY SKILLS FOR STAGE 1	
ASSIMILATION	Dealing with bureaucracy; understanding meanings; discerning between what is said and what is meant
AWARENESS-RAISING	Sharing experience of project work, theme, working with EQUAL Managing Bodies, NSS etc.
BROKERING	Bringing partners together
CAPACITY-BUILDING	Assisting and supporting partners who lack skills, finance or confidence to work in partnership
COMMUNICATION	Listening to others; clearly communicating the case for partnership
FACILITATION	Managing early discussion between different potential partners both internally & externally
LEADERSHIP	Being a subtle leader; having sensitivity and awareness and an open and inclusive attitude
NETWORKING	Identifying potential partners and mainstreaming possibilities as well as wider stakeholders
MOTIVATING	Encouraging engagement; giving an exciting vision of what is possible; energising
PERSUASION	Finding arguments to encourage potential partners
RESEARCH	Prospecting; selecting new partners through positive and negative criteria research; “big picture mapping” of wider context
TIME MANAGEMENT	Keeping things on track; allowing a balance for experimentation and inquiry with practical tasks

RESOURCE BOX

EQUAL RESOURCES

A range of practical information is provided for EQUAL Partnerships through the following websites:

EQUAL	http://europa.eu.int/comm/employment_social/equal
Austria	http://www.equal-esf.at
Belgium	http://www.fse.be
France	http://www.equal-france.com
Ireland	http://www.equal-ci.ie
Portugal	http://www.equal.pt
Sweden	http://www.esf.se
UK	http://www.equal.ecotec.co.uk

Europemploi (2001) *Guide du partenariat de développement* Ch 2: Comment construire un PDD? <http://www.equal-france>

GB Equal Support Unit (2004) *Partnership working – a guide for Development Partnerships*, Birmingham, UK – Chapter 3: Getting Started <http://www.equal.ecotec.co.uk>

OTHER RESOURCES

George, L. & Madden, K. (2000) *The Partnership Brokers Handbook*, UNSC & IBLF, London <http://www.partnershipbrokers.net>

Kjaer, L. & Caplan, K: Partnership Results: Concrete Achievements & Societal Gains, in Kjaer, L. (2003) *Local Partnerships in Europe, An Action Research Project*, The Copenhagen Centre, Copenhagen

LEDA Partenariat Association Ltd. *Resource Pack 2: Setting up local partnerships for Employment* – Chapter 1: The origins of partnerships

Nelson, J & Zadek, S. (2000) *Partnership Alchemy, New Social Partnerships in Europe* The Copenhagen Centre, Copenhagen - Chapter 5: Pathways to Successful Partnerships

Tennyson, R. & Wilde, L. (2000) *The Guiding Hand – Brokering Partnerships for Sustainable Development*, PWBLF & UNSC – Chapter 3: The Partnership Broker's Path, Stage 1: Getting Started; Stage 2: Identifying Partner Organisations; Stage 3: Committing Resources

Tennyson, R. (1998) *Managing Partnerships, Tools for mobilising the public sector, business and civil society as partners in development*, IBLF, London – Chapters 1-2 & Partnership Resourcing Checklist, <http://www.partnershipbrokers.net>

Tennyson, R. (2004) *The Partnering Toolbook*, IBLF & GAIN, London – Chapter 2: Building Partnerships and Tools 1-2

STAGE 2: INITIATION

Ensuring commitment and equity of involvement

“All effective partnerships are win-win alliances based on delivering a practical programme of mutual benefit.”

This stage is concentrated on securing partner commitment and involves establishing structures and guidelines for the partnership. Partner representatives constantly meet discuss and review issues in order to arrive at understandings on the partnership’s goals, objectives and structures. Roles and responsibilities are allocated and some form of agreement to co-operate is secured. Time, commitment and patience in working together are once again vital.

WHAT WORKS BEST AT THIS STAGE

- Developing good communication among partners
- Reaching common agreement on key issues
- Creating a strong organisational structure
- Focussing partners on practical project tasks
- Building appropriate tools for the work
- Exchanges of professional practices across countries
- Reserving plenty of time for discussion

KEY CHALLENGES

- Managing early meetings before results are produced
- Dealing with perceived “self-interests” of partners
- Setting up new systems to monitor and communicate
- Dealing with “passenger partners” who lack real commitment to the work
- Developing successful transnational exchanges

CHECKLIST OF KEY ISSUES TO ADDRESS

Finding a common vision

Reaching consensus about what the partnership stands for and its central purpose is important in giving a sense of commitment to the partnership.

AGREEING ON A COMMON VISION

Ireland: Equal at Work -The Dublin Employment Pact

Following the decision to establish the partnership to pursue the goals identified under EQUAL, a series of workshops were held to establish the goals and Mission of the partnership. These workshops were facilitated by a key member of staff involved since the start of the process and enjoying the trust of the partners individually. The first key principle established was that all decisions would be by consensus and that this would apply in all cases. Establishing the Mission of the partnership then proceeded on the basis of refining and defining the core of the objectives the partners wished to pursue. In this process, the facilitator was instructed to ensure that the outcome could be evaluated “from any angle” as a win-win formula, i.e. that every partner had something to gain individually, as well as the sum of the gain being greater for all than their immediate individual gain. On this the formula reached from approximately twelve objectives was the overarching aim which described them all clearly and practically – “Creating an Accessible Labour Market through Open Human Resource Practices”.

TIP: Make sure that it is the group and not an individual who drives your vision forward!

Defining core principles

Agreeing on “rules of engagement” and making sure that these are communicated clearly among all partners to help build trust through dialogue and respect among partners.

Agreeing on aims, objectives and methods

Clarifying aims, objectives and methods by defining exactly what the partners wish to pursue and how they will go about this.

TIP: Have realistic goals!

Allocating roles and responsibilities

Before a proper structure can be agreed upon it is important to make decisions about what key roles are necessary and how the best person is allocated to a particular role. Deciding who should carry out different activities is usually based on skills, resources etc. It is also vital to ensure that roles are made clear and equitable across the partnership.

DECIDING WHO DOES WHAT

FRANCE: De la précarité à l'emploi durable

The DP is made up of three training centres concerned with vocational training, professional integration, and illiteracy (AGORA, IBEP and AFA Le Goëlo) as well a network of companies for interim employment (ADIA) and a network of hostels for young workers (URFJT). “Who does what?” was a central question right from the start. It was agreed that a structure that built upon the strengths of each partner would be established:

AGORA (the pilot organisation for the EQUAL project): nominates lead projects and co-ordinates experimentation, creates links between each member of the partnership (national & transnational) and supports the different project groups.

Orientation Committee: includes project funder representatives and the managers of the training organisations. Meets annually.

Piloting Committee: includes nine members - official representatives of each partner. Meets at least four times a year and makes decisions on the project's development.

Project Group: members come from resource people for the project. Links the Pilot Committee and the Teacher Training Group.

Teaching Training Group: made up of seven different trainers from AGORA, IBEP, AFA Le Goëlo and a member of ADIA's Human Resource Department.

TIP: Define clearly and carefully who will take which role and why!

THE GROW APPROACH: ADDRESSING THE INITIATION STAGE

Sweden: Diversity in Västernorrland -The Diversity in Västernorrland DP has based its development on a GROW structure that agrees on:

G – Goals

R – Realities

O - Options (opportunities, ideas, possible activities)

W –Who? What? When?

GOALS: Discussion of overall goals, sub-goals as well as the results and effects sought in the long and short-term.

REALITY: Examination of the opportunities to conduct change. Aspects that support EQUAL ideas and those that represent obstacles - in certain cases the same factor can both support and hinder.

OPTIONS

- Open discussion of conceivable means to achieve the goals listed. In the case of the Västernorrland DP this involved agreement to:

- Survey obstacles and describe them; develop, gather and spread knowledge and deliver good examples and role models

- Use, help and support each other and heighten self-esteem

- Increase involvement in own and others' projects within and beyond DP and encourage and arrange meetings within and beyond DP

- Work for continuity during project period and after project conclusion

- Seek resources

WHO? WHAT? WHEN?: Allocate roles and responsibilities; agree on activities and the time schedules for these.

Partnership Agreements

Securing partner commitment is important at this stage. This may take the form of a formal contract or a less formal Memorandum of Understanding or agreement to co-operate. Often an agreement is the starting point for working together. This may become formalised as the partnership develops and the projects that it works with demand a need for legal service-level contracts.

TIP: *Use your Partnership Agreement as a reference point for evaluation of partner progress and contribution!*

Partnership Structures

Ensuring that procedures and appropriate management and administrative structures are in place takes precedence at this stage. DPs may choose between a formal (legally registered entity) and a more informal structure (loose network) for partnerships.

A **formal structure** provides a focus for activities and a good position from which to mobilise and manage resources. It can, however also incur administrative costs and may be regarded as too bureaucratic for some DPs. A more **informal structure** offers greater room for ideas and is less rigid but external audiences may not take it as seriously and partners may also neglect it when their own organisational work priorities are particularly heavy.

KEY ELEMENTS TO INCLUDE IN A PARTNERSHIP AGREEMENT

PARTNERS : List of organisations involved

STATEMENT OF INTENT : Short summary of the aim of the partnership

ROLES & RESPONSIBILITIES : Each partner’s role/contribution to the partnership

CONTACT FOR EQUAL MANAGING AUTHORITY : Nomination of key EQUAL contact point

STRUCTURES & PROCEDURES : Short summary of working, communication and decision-making processes - how the partnership will be managed and administered

FINANCIAL ARRANGEMENTS : Who will be responsible for administering funds, etc.

EVALUATION : Agreement to audits, reviews and monitoring procedures

OTHER ISSUES : Intellectual Property Rights, use of logos, liabilities, etc.

CREATING A STRUCTURE

Austria: RepaNet

RepaNet decided not to establish a legal organisation to run the EQUAL-partnership. Instead it concentrated on ensuring a clear structure for co-operation that included:

- A Steering Group: one member of the social partners organisations each, the Ministry of Environment, one member of the participating five employment initiatives (responsible for most of the operational work), gender-mainstreaming representative, the organisation responsible for finances and the co-ordinating organisation.
- A “Mainstreaming”- Working Group composed of the steering group and the Austrian Waste Management Association (all Austrian municipalities are members)
- A “Repair” Working Group where standards are established
- An “Employment and Environment” network consisting of five employment initiatives and open to other employment initiative representatives who want to share experiences within the group.

Ireland: Sonas DP Ltd

Our DP faced this problem of structure and grappled with it for quite some time. Three options were apparent to us: (1) A ‘loose’ informal agreement (2) A formal legal partnership arrangement (3) A company arrangement limited by guarantee. We considered these options and after much discussion were clear that we needed to create an ‘entity’ that: - Was distinct from the partner organisations - Had formal status in order to transact financially and assume responsibility - Was capable of sharing legal responsibility equally between partner organisations but also to comprise only the DP members - Indemnified the DP members for actions taken in the name of their parent organisation. These parameters pointed to the fact that we should set up a **company limited by guarantee**. Having agreed to this we then had to ‘sell’ the idea to the parent organisations. Some of them had a problem because internal rules meant that the manager was the only person empowered to act as a director of another company and to appoint a less senior person to such a position was against their practice. However we were adamant that we need not want even nominal power to be vested in a person who was not the regular DP member at our meetings. We foresaw problems if, for instance, we had to get signatures from people who were not intimately involved in the running of the DP. Eventually all the organisations agreed to the proposed structure which has proven to be highly successful.

Ireland: Equal at Work – The Dublin Employment Pact

The challenge for a large partnership with 48 partners was to create structures which ensured both maximum practical involvement by partners on the one hand and a smooth functioning project management system on the other. A Management Committee of 12 members representative of all sectors involved on the Development Partnership (local authorities, social partners, NGOs etc.) was appointed. This Development Partnership Management Committee manages the Project Manager and the overall project. In addition, each of the four “sites” of the project established a management committee comprising all actors active in that particular site. In this way, a relatively smooth multi-level management system was created where all partners were actively engaged at the point of their greatest interest. The process was necessarily slow, but involvement of a wide range of partners in planning and design of the initiative ensured buy-in and commitment.

Sweden: Diversity in Västernorrland

We achieved this through formal (upon which to base work) and informal (achieving co-operation with group) processes. The DP consists of 14 organisations and they represent three different roles/grounds for participation. The first group has ideas for measures and is involved in diversity issues. The second group is responsible for measures that concern the target groups. The third group is composed of financial backers.

The formal process: Agreeing on roles/grounds for participation for different groups. Different roles enriched the project, especially because of the “ideas-base”. Problems arose with different languages, knowledge systems and methods of working. The degree of commitment as well as the scope of the mandate varied according to role and reason for participation.

The informal process: Process discussion was important for creating guidelines. Facilitated dialogue was established and agreement on meeting schedules for the entire year; rotating hosts with different objectives in relation to partnership; keeping abreast & involved in current labour market issues; involvement of all members with tasks in working groups & commitment to support and assist one another.

TIP: Form clear structures right from the beginning!

Management

Partnerships also face choices between a formal **centralised management** system, usually by one of the partner organisations acting on behalf of the partnership, or a more flexible and **decentralised** system in which different partners carry out different management tasks. Centralised management offers an efficient way of working but may be regarded as too conventional for partnerships as it does not reflect their collaborative and cross-sector nature. The choice of management for a DP depends crucially on the context in which the DP is working and the nature of the different partners involved.

Staffing

It is important to make sure that the partnership is adequately and suitably staffed. In order to ensure the sustainability of the project most DPs suggest early recruitment and involvement of the right people, paying careful attention to team numbers, composition and personal profiles. Choosing staff who have an awareness of EQUAL and thematic or project issues is important as are clear and concise job descriptions.

TIP: Make sure that the project is staffed with team players!

Establishing decision-making structures

Establishing decision-making structures that are equitable and participative is a crucial part of partnership initiation. These are usually agreed upon by all partners on the basis of collective responsibility. They need to be transparent and clearly understood across the partnership with methods of ensuring that decisions arrived at are genuine so that false consensus that might prevent proper analysis of any challenges and problems facing the partnership is avoided. Although only important decisions may require the involvement of all the partnership, partners must also have access to day-to-day decisions. Partnerships also need to think carefully about how beneficiaries will be involved in decision-making - whether through representative bodies or citizen participation.

ENSURING DEMOCRATIC DECISION MAKING

Austria: RepaNet

Central decisions within the partnership are made by all partners. The definition of what is a central decision was made during the first meeting of the whole group. It was agreed that all decisions should be agreed by consensus as a principle within the network. If this cannot be achieved, the following rules are valid:

- A qualified majority of 2/3 must agree (10 of 14 partners)
- The organisation responsible for finances, the gender mainstreaming representative, the Steering Group and the simple majority of the five participating employment initiatives have the power of veto against decisions made by a majority.
- To simplify decision-making and reduce meetings partners can vote via RepaNet's Internet platform.
- There are no rules for excluding a partner but there are rules on how to handle conflict (mediation strategies).

TIP: Make sure that there are clear protocols and procedures for all decision-making processes!

Establishing a solid internal communication network

Clarity and clear communication within the partnership is vital at this stage so that all partners are informed about key issues. This involves regular, accessible and succinct information sharing between partners.

ESTABLISHING GOOD COMMUNICATION AMONG PARTNERS

Portugal: Públicos Diferentes. Iguais Oportunidades

Our communication system was created with:

- A dedicated member of the project staff responsible for circulation of all project information among partners.
- Regular partner meetings (once a month with all the partners; twice a month with the thematic group partner).
- Production of concise documents about the DP's meetings that are distributed among partners.
- Activity maps every month where different partner roles and responsibilities are made clear.
- Sharing information about each partner and their goals besides the EQUAL project.
- A periodic newsletter about the project in which every partner contributes - not just about the project and their responsibilities in it but also about themselves.
- Regular internal evaluation meetings.
- Discussions sessions about communication
- Building an environment of trust and friendship.

Building in early evaluation and monitoring systems

It is important to establish review and monitoring procedures at the initiation stage of the partnership. Track both partner commitment and the meeting of beneficiary needs as the partnership develops its project work should both be incorporated into the measurement process.

TIP: Develop monitoring structures that are easy to use!

STAGE 2: SUMMARY OF SKILLS AND RESOURCES

KEY SKILLS FOR STAGE 2	
COMMUNICATION	Conducting open dialogue in order to build trust; discussing all aspects of the work; reviewing and revising where necessary and sharing information among all partners
CO-ORDINATION	Setting up clear guidelines and structures; allocating roles and responsibilities; using methodologies based upon clearly defined tools
DECISION-MAKING	Making democratic choices about how decisions will be made
DIPLOMACY	Being tactful with different partners
EVALUATION	Revising, reviewing and monitoring
LEADERSHIP	Exercising diplomatic and sensitive leadership
MANAGEMENT	Managing meetings and encounters well; working with clear structures and guidelines
NEGOTIATION	Being able to devise ways of working with different partners that accommodate different styles and approaches
PERSUASION	Showing how a partnership approach can overcome the difficulties of working alone; convincing all partners that a joint approach is best and that all can contribute to making it work
PLANNING	Developing work plans and project schedules; task allocation; meetings etc.

RESOURCE BOX

EQUAL RESOURCES

Partnership Agreements:

Accord de Partenariat de Développement, <http://www.equal-france.com>

Transnational Cooperation Agreement, <http://www.equal-france.com/docs/TCA.doc>

Europemploi: *Guide du partenariat de développement (PDD)* - Ch.2 Comment construire un PDD? <http://www.equal-france.com>

GB Equal Support Unit (2004) *Partnership working – a guide for Development Partnerships*, Birmingham, UK – Chapter 3: Getting Started <http://www.equal.ecotec.co.uk>

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STAGE 3: DEVELOPMENT AND DELIVERY

Assessing the innovativeness and quality of the outcome

“Making things happen is very important for the engagement of the partners.”

This stage can be the most difficult time for a partnership. The earlier stages involve the excitement of formation and now the focus is on working together for delivery and sustainability. Constantly checking that objectives remain common and that partners are engaged in the work is crucial. At the same time mechanisms and processes for the smooth running of the partnership need to be consolidated. It is also important to ensure that progress is monitored and reviewed.

WHAT WORKS BEST AT THIS STAGE

- **Setting up a strong methodology for the teamwork**
- **Clear goals and structures**
- **Common problem-solving**
- **Full participation of all members to promote mutual respect and trust**

KEY CHALLENGES

- **Time consuming nature of activities**
- **Dealing with partners who have financial difficulties**
- **Keeping partner representatives involved in non-task-oriented work such as meetings about process that are essential to the work of a partnership.**
- **Working with diverse sectors and styles - operating at different levels (local, national and transnational) and managing organisational differences in power, status and resources**
- **Wrongly placed personnel – project managers, co-ordinators, consultants, evaluators - who upset motivation and project direction**
- **Losing partners during the project work through lack of commitment, failure to obtain expected benefits or lack of institutional support**

CHECKLIST OF KEY ISSUES TO ADDRESS

Maintaining involvement and participation

Making sure that partners are engaged and feel committed to the partnership by ensuring that each partner is seriously involved in its work project is vital at this stage. A sense of ownership and a feeling of identity and belonging to the group is needed. This demands:

- **Continuous regular contact** where partners constantly touch base through conferences, seminars, workshops, meetings, discussions, reviews, newsletters, e-mail, phone calls and visits
- **Practical engagement** through an emphasis on productivity and the demonstration of some early form of tangible output that can transmit a sense of achievement
- **Clear and realistic goals and objectives** with strong action plans that acknowledge differences in ideologies and ways of working
- **Creating an open atmosphere** with clear and transparent procedures and links with wider stakeholders
- **Clear leadership** which positively promotes the work of the partnership and participation within it
- **Building good relationships** by using informal activities such as evenings out together, visits etc
- **Mentoring** and supporting partners who are held back by issues such as lack of resources/experience

TIP: Positively promote partnership engagement and reward this!

Ensuring compliance

It is important to find positive ways to make sure that partners do what they agreed to do at the start of the partnership and contribute fairly to its work. Suggestions for this include:

- Applying targets
- Holding regular meetings in which discussions about all aspects of project work are discussed - partners report on their roles and written minutes with action points are revisited.
- Reminding all members of the Partnership Agreement and their obligations within this
- Promoting trust

MAKING SURE PARTNERS DO TO WHAT THEY HAVE AGREED TO DO

PORTUGAL: Públicos Diferentes. Iguais Oportunidades

Every three months we draw up a table with the activities of the project for that period pointing out who is responsible for what. In every meeting we check the table in order to see how things are going. Also every month we make a small table of the work to do with preview and realisation outlines. This seems to work because no one likes to be shown up as not having completed their work.

TIP: Be sure that each partner is seriously involved in the partnership and project!

Establishing and consolidating processes, mechanisms and systems

As the partnership develops its work it is important that it has mechanisms in place for different aspects of its operations. These include communication, conflict-management, evaluation, finances and reporting.

TIP: Establish transparency in all procedures!

Communication

Strategies need to be developed so that information is shared both internally among partners, and within partner organisations themselves so that individual partner representatives ensure organisational buy-in to the partnership. This is key to the promotion of transparency and trust-building among partners. External communication to stakeholders and the general public is also needed to promote and mainstream the work of the partnership. This is important for maintaining the engagement of wider stakeholders and/ beneficiaries and ensuring that they are involved and /consulted at this stage of the partnership. Suggestions for strong communication strategies include:

Internal Communication:

- Regular meetings, telephone conferencing, email, use of an Internet platform, workshops, newsletters
- Having a single communication focus as a module within the partnership
- A staff member responsible for information circulation
- Giving regular feedback within the partnership
- Using different partner communication skills and resources
- Encourage the development of personal communication skills
- Being open and transparent - allowing partners to say how they feel and discuss problems

USING AN INTERNET PLATFORM

Austria: RepaNet

RepaNet uses a structured approach to communication through an Internet platform for accounting, monitoring contributions, voting and reporting. Working in this way is seen as simpler and less time-consuming than having meetings although obviously not all of them could be substituted by working in this way. Users are trained to work with the platform in workshops and there are different access levels linked to partner roles and responsibilities. It is seen as a validation tool that promotes transparency by allowing members to improve and check on participation.

Portugal: Mudança de Maré (PT-2001-230) *

This DP has developed a successful online Document Administration System (Sistema de Administração Documental /SAD) in order to manage partnership information, produce reports and develop Documentation Centres that specialise in the different fields in which partners work. www.ajism.org/mm

* This DP was not involved in the Learning Project but provides a useful example for other EQUAL Partnerships to learn from.

External Communication:

- Establish media relationships – partnering with a local newspaper or engaging a journalist to follow the work
- Have someone who can communicate the work of the project outwards to relevant journals/papers etc
- Create links & communication with official structures
- Newsletters, press releases

- Use the internet – platforms and websites
- Seminars and conferences
- Training on information issues
- Building wider networks

BUILDING WIDER NETWORKS

Portugal: ConVidas (PT-2001-164) (Permanent Platform for Reconciliation) *

In order to encourage online cooperation among institutions, various local entities were invited to take part in a Permanent Platform for Reconciliation of Work and Family Life, intended to be a broad network that is representative of different interests and approaches. The aims of the Platform, which meets on a quarterly basis, are to reflect on, discuss and assess the situation in the Covilhã area with regard to the reconciliation issue, interventions to resolve problems identified, and ongoing monitoring of the ConVidas Project's intervention. 32 organizations participate in this Platform. They include representatives from: 5 Project formal partners (Beira Serra - Local Development Association, Covilhã Municipal Council, Business Nucleus, the Joint Trade Unions of Castelo Branco and University of Beira Interior) as well as from Regional Social Security authorities; Employment Centre and Health Centre; Educational Coordination; Parents' Association - Primary and Secondary Schools; 10 Parish Councils from within the Project's catchments area; 2 entrepreneurs; 2 trade union delegates; 3 representatives of the family support services (children, elderly, disabled) and a Public Transport Firm.

Ireland: Equal at Work, The Dublin Employment Pact

The Equal at Work Partnership is a member of the National Adaptability Thematic Group and has made joint submissions with the NSS to the National Centre for Partnership ("Workplace of the Future" Consultative Process). It is also involved on the National EQUAL Mainstreaming Group and the EU Thematic Working Group.

* This DP was not involved in the Learning Project but provides a useful example for other EQUAL Partnerships to learn from.

TIP: Share and circulate information on the development of all key activities!

Reporting

Communication also involves reporting both internally to partners and externally to EQUAL bodies. Most DPs have exhaustive reporting mechanisms. These include:

Internal reporting

- Each partner reports regularly on their role at meetings (monthly, bi-monthly or quarterly)
- Written reports that are compiled and shared at meetings

Reporting to EQUAL bodies (Managing Authorities and NSSs)

- Through access to Internet platforms
- Co-ordinator reports
- Regular reports at six-month intervals
- Annual reports on DP activities

REPORTING

Sweden: Diversity in Västernorrland Reports within the DP

In order to obtain effective reporting from our subprojects we decided that written reports were to be presented prior to DP meetings. The reports are for information only but sometimes discussion is needed if there are problems to be resolved or success stories to be shared. The reports make it possible to monitor the overall development of our partnership. Dissemination is decided upon by the DP and has involved an increasing need to send out reminders as this has grown. There are always two standing items on the agenda for DP meetings concerning reporting from our national and transnational working groups. They include questions about what has happened since the previous month, what is planned, who is involved and financial matters relating to this.

Reports to others

The DP submits reports to the Swedish ESF Council at regular six-month intervals. For transnational work a short account is presented after each co-ordination period of responsibility. An annual report of the DP's undertakings is compiled by the co-ordinator. It is important to provide feedback to the management of the partner organisations but also to allow broad dissemination to other interested parties. Most reports issued by the DP are compiled by the co-ordinator and are supplemented and approved by DP members prior to distribution.

TIP: Use reporting processes to review and revise your work!

Finances

A range of options exist for dealing with funds and accounting procedures. These might include:

- Quarterly expenses justification provided to EQUAL managing bodies
- DP co-ordinator responsible for compiling final budget recommendation and making adjustments if necessary
- Involving a Managing Authority or NSS contact person in issues related to the budget and co-financing
- Requesting regular verbal and written information on budget status
- Training in accounting
- Quarterly requisitions for the project with review of the basis for this by an accounting assistant prior to payment
- Approval processes before payment is made.

TIP: Have clear and accountable arrangements for finances!

Conflict Management

It is important that problem-solving mechanisms are in place within a partnership so that there are established processes for dealing with issues that may cause conflict. This involves encouraging transparency and openness so that problems can be defined and reflected upon.

TIP: Share what happens within organisations involved in the DP - a conflict or crisis within a DP can be a learning opportunity!

Evaluation

Formative evaluation systems work well for DPs and a number of different methods have been developed for this process. Some DPs have found it necessary to use an external evaluator though they stress that it is imperative that whoever is selected clearly understands the partnership project and its aims. Others prefer to develop internal evaluation systems and in which evaluators are part of the partnership process. In both cases the main actors within a partnership need to have an understanding of evaluation and what it involves.

EVALUATION PROCESSES

Ireland: Sonas DP Ltd

Based on Social Auditing through a continuous process involving stakeholders (clients, communities, funders). This system is inclusive and idealistic but very time-consuming. It involves: identifying aims and objectives; establishing key performance indicators; using a questionnaire and feedback to the Social Audit team. The element that has been most useful to the DP is the establishment of key performance indicators.

France: De la précarité à l'emploi durable

Similar to process used by Sonas (Ireland) but places more emphasis on feedback to funders. It uses a committee for experimentation; assesses work progress (conditioned by regional & political agendas); has a Funders Committee that also evaluates EQUAL work and an operational group that uses training tools and assesses impact on beneficiaries.

Sweden: Diversity in Västernorrland

The DP co-finances a graduate student in sociology from Mid-Sweden University who follows the work over a three-year period. The DP is able to comment on the research plan for this (which covers a period longer than the EQUAL project). The research and education department of the Association of Local Authorities contributes expertise in quantitative methodology that supports the evaluation. Certain subprojects have their own evaluator linked to their undertakings. Some evaluation is conducted through the Swedish ESF council. The DP meeting structure serves as an ongoing self-evaluation of day-to-day work.

Ireland: EQUAL at work – The Dublin Employment Pact

A weakness in the development of our DP was not evaluating the actual commitment of partners as the project progressed. Commitment varied naturally in direct relationship to the individual quantifiable gain partner organisations could determine for themselves in the process/project. This was reflected in various ways e.g. the status/seniority of representatives seconded by partner organisations, attendance at meetings etc. Monitoring this was what the project did not do so well, except informally, and in this way it was picked up by the formative evaluation system. In our case remedial action was taken in a particular case of waning partner commitment. The remedial action worked but would have been much more effective if identified and acted upon earlier in the process.

Suggestion: A systematic monitoring/tracking tool in this area could be developed and included in the brief of a formative evaluator, with strategies for remedial action.

TIP: Invest time and effort in setting measurable targets with clear link to partnership's participant and societal benefits!

Accountability

Linked closely to evaluation is the issue of accountability and how partnerships work to ensure this across the diverse organisations within them. Challenges include conflicting loyalties among partner representatives to the partnership and to their own organisation as well as difficulties in being able to share frank criticism about the performance of a particular partner. Key to ensuring accountability is identification with the partnership's work. A strong evaluation and reporting system with regular partner meetings to ascertain progress may help here.

ENSURING ACCOUNTABILITY

UK: JIVE (Intervention) PARTNERS, UK

Regular meetings: DP meetings where partners give reports and hear about wider aspects of the project with a core management report. Networking meetings for project staff including finance and administration officers. Initially held six-monthly meetings for all project staff to meet and discuss current issues or hear about other aspects of the project they are not directly responsible for.

Shared publicity: Sharing pre-agreed publicity and promotional material that includes all partners and acts as a sort of corporate ID. Includes poster displays that are available for partners to use.

WHAT WORKED

- Regular DP meetings
- Rotating venues through partnership
- Involving national coordinators of the strands
- Shared publicity good for ownership
- Visits to partners – to identify their yearly delivery plan and review finances. Some partners drew up extensive review reports of their previous partnership years as well as future plans

WHAT DID NOT WORK

- Travelling distances
- Initially made some partners nervous about hosting these meetings, but they soon got used to them
- Strand coordinators had lots of other work as they were the more experienced members of staff
- Hard to motivate staff to submit regular reports particularly when strand coordinators were very busy, but on the whole they were submitted on time
- Consultation time and some administrative problems meant that less adventurous partners held back from delivering as they were waiting for project

TIP: Put accountability at the heart of your partnership!

Getting institutional buy-in

During this stage of partnership-building there is a growing need to ensure organisational commitment to the partnership as opposed to just that of individuals. It is important that individuals representing their organisations within the partnership have a “licence to operate” and speak authoritatively on their behalf. Such mandates need to be checked regularly. If authority appears limited the partnership needs to find ways to change this. Methods of ensuring institutional buy-in include:

- Knowing partners well and being sure of their professionalism (easiest in a small DP)
- Regular reviews to explain the nature and purpose of the DP and its project work
- Involving different individuals from the management of a partner organisation - senior personnel invited to seminars and meetings or asked to chair and participate in events, contacted with updates and information
- Using a dedicated worker to bring organisations on board
- Dissemination of information about the DP in different organisational newsletters
- Holding events on different partner premises
- Holding open lunches to disseminate the work of the DP
- Reports sent to executive meetings of different institutions in the DP

TIP: Involve and inform senior staff from partner organisations in your work!

Working with diversity

This involves accepting and working with a variety of different attitudes, cultures and working styles across the partnership. Different approaches to innovation, experimentation, change, decision and responsibility processes must be managed carefully with an acknowledgement of different levels of partner engagement and availability, working paces and time schedules.

DEALING WITH DIVERSITY

PORTUGAL: Públicos Diferentes. Iguais Oportunidades

DP meetings are held in which everything is open for discussion and in which we try to create an environment where everyone feels valued and comfortable enough to give honest opinions. In addition we have drawn on our “soft skills” to:

- Develop a good knowledge about the different partner organisations, including how they work and how this impacts the project.
- Identify the positive aspects of each partner’s work and “canalise” them for the project.
- Ensure the involvement and participation of all partners in the delivery of the project.
- Be flexible.

TIP: Examine approaches and stereotypes – partnership diversity can add value to different partners!

STAGE 3: SUMMARY OF SKILLS AND RESOURCES

KEY SKILLS FOR STAGE 3	
BALANCING	Working to achieve fairness and equilibrium – using a carrot and stick approach; becoming skilled as good moderators
COMMUNICATION	Using open and culturally sensitive language; simplifying jargon; explaining EQUAL clearly to all partners and stakeholders
EVALUATION	Revising and monitoring
FLEXIBILITY	Being prepared to change things
INFORMATION-SHARING	Sharing what happens within organisations involved in the DP; encouraging open discussion from the start of the project among all partners; exchanging learning outside the partnership
LEADERSHIP	Ensuring that all partners are motivated and visibly engaged in the partnership; bringing theory into practice; being a “democratic dictator” – making sure that delivery is real and conforms to EQUAL, not just ticking boxes
MANAGEMENT	Ensuring that administrative systems run smoothly and that meeting dates are adhered to especially when people are busy &/ are strategic partners
MENTORING	Supporting partners who are having organisational difficulties that affect their involvement or delivery in the partnership; or who lack confidence or feel disengaged; help partners grow!
RELATIONSHIP-BUILDING	Building formal and informal relationships all the time!

RESOURCE BOX

EQUAL RESOURCES

Europemploi: *Guide de l'évaluation EQUAL France* <http://www.equal-france.com>

Europemploi: *Guide du partenariat de développement - Ch.2 Comment conduire un PDD?*
<http://www.equal-france.com>

EQUAL Community Initiative EQUAL *Project Planning and Operations Manual*, - Documenting And Reporting On Your Equal Project; Disseminating Information On Your Equal Project <http://www.equal-ci.ie>

GB Equal Support Unit (2004) *Partnership working – a guide for Development Partnerships*, ECOTEC, Birmingham, UK – Chapter 4: Developing the Partnership & Chapter 5: Making your Partnership effective <http://www.equal.ecotec.co.uk>

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STAGE 4: MAINSTREAMING

Adapting and institutionalising results

“It is essential to obtain genuine links into powerful mainstreaming organisations enabling successful local pilots to proceed to a mainstreaming strategy.”

Although mainstreaming is a constant process throughout the Partnership Learning Cycle, this stage is specifically about working to spread the learning from project work and integrating it into wider arenas so that it impacts upon the agendas of decision-makers. Strategies for this require intervention and the support of national EQUAL structures is key here. Both personal engagement and good leadership are critical to mainstreaming success.

The DPs involved in the project had not yet fully embarked upon the Mainstreaming Stage of their work. As a result the material in the following section contains their general thoughts on the issues considered important at this stage.

CHECKLIST OF KEY ISSUES TO ADDRESS

Using results, outcomes and learning

The mainstreaming process involves finding ways to scale-up, share and replicate for sustainable change. Suggestions for this include:

- Acquiring a mainstreaming budget
- Using a mainstreaming agenda to accompany all project actions from the preparatory stage. This should include identification of issues, key mainstreaming players and scoping what mainstreaming will entail
- Establishing national-level negotiations around mainstreaming
- Working with individual organisations to mainstream the project within them

Working with mainstreaming organisations

Working strategically with mainstreaming organisations such as government departments, national and private sector bodies is vital at this stage. A system of structured access and /or dialogue, underpinned by commitment by EQUAL Managing Authorities and National Support Structures to engage such institutions and networks is important for:

- Influencing public policy frameworks and ensuring that the purpose and aim of the EQUAL programme becomes a part of national politics
- Harnessing financial resources for further work
- Enabling successful local pilots to proceed to a mainstreaming strategy

Communication channels for mainstreaming

A variety of different communication channels may be used to mainstream the work of EQUAL partnerships. Options include:

Media: Specialised press, local and official press, newspapers, radio, TV

Internet: Websites, Internet platforms

Professional organisations: Journals, brochures, publications, legal texts

Academic links: Universities, colleges, journals, newsletters, conferences, seminars

Wider networks: National Thematic Groups, learning networks, conferences

DPs: Exchange programmes, meetings, workshops as well as internal work with partner representatives and organisations

RESOURCE BOX

EQUAL RESOURCES

EQUAL, *Networking For Inclusion, Preparatory Documents*, Barcelona 16-17 May 2002, http://europa.eu.int/comm/employment_social/equal

EQUAL Community Initiative *Mainstreaming Strategy for EQUAL* <http://www.equal-ci.ie>

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STAGE 5: FUTURE ACTION

Establishing a strategy for continuous and sustainable change

“The deadliest thing for a partnership is to perpetuate it for its own sake.”

EQUAL Partnerships need to think carefully about what they wish to happen when their work is completed. Future scenario planning is an important part of the partnership-building process and should include an examination of possible options for the partnership. This includes asking questions about whether the partnership must necessarily persist in its own right; what strategies need to be in place to ensure some form of continuity and who should take responsibility for developing these.

CHECKLIST OF KEY ISSUES TO ADDRESS

Having an exit/moving-on strategy

The DPs in the project had a range of different wishes for what might happen after their work was completed. These included:

- The implementation and dissemination of our methodology throughout the region and eventually at European level
- Becoming an influential part of a national and regional network that will last
- Dissolving and reforming around specific tasks relevant to mainstreaming, future EQUAL proposals etc.
- Seeing that changes are implemented inside partners organisations
- Working more with specific partners on certain aspects of the work
- Developing further innovative work
- Effecting real and lasting change
- Developing a new network which has learnt from the challenges of the current DP and can build relationships more successfully as a result
- Working with other programmes and sharing experiences in a different country

Strategies for future action include:

- Establishing more structures
- Communicating the message through results of DP's work
- Identifying key tasks that can be jointly accomplished
- Establishing a wider focus
- Reinforcing the involvement of the managers of partner organisations
- Establishing protocols for future collaborations

Close liaison between DPs and EQUAL Managing Authorities and National Support Structures was seen as instrumental for leading on future action.

PREPARING FOR THE FUTURE

Ireland: EQUAL at work – The Dublin Employment Pact

The DEP Equal at Work Partnership has already held internal meetings around possible future joint work. The outcome to date has been to identify some clear common goals, identify new partners who should be involved, and allow old partners to go their own way. We also see our partnership as part of an ever-changing regional partnership infrastructure which easily comes together, dissolves, reforms in different sets, etc. around labour market development issues, with the core value focus on equality/inclusion/progression. Also, alliances and new partnership circles have emerged from the Equal at Work DP. These have crystallised around mainstreaming strategies and will continue to be active in this regard outside of EQUAL. These are the Jobrotation network now pulled together in Dublin through the project, the network of Dublin local authorities, health authorities etc. around HR issues and the network of community & voluntary sector organisations in the city which is now developing a series of mainstreaming actions independently of EQUAL.

Making sure that outcomes for beneficiaries are sustainable

When a partnership completes its work it is important that the outcomes for beneficiaries are sustainable. Suggestions for ensuring this include:

- Continuity of the strategy implementation with the support of governmental organisations and social partners throughout the region
- Long-term mainstreaming/sustainability strategies with structured monitoring of impact and outcomes and mechanisms for revisiting the issues after the end of the project to measure effects
- Accepting changes in work methodologies that have demonstrated positive outcomes for beneficiaries

TIP: Try to organise the sustainability of the project by early involvement of the right people!

RESOURCE BOX

EQUAL RESOURCES

GB Equal Support Unit (2004) *Partnership working – a guide for Development Partnerships*, Birmingham, UK – Chapter 6: What happens next? <http://www.equal.ecotec.co.uk>

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CONCLUSION

EQUAL Partnerships work across national boundaries, sectors and organisations that have different working styles, languages and cultures. This is both complex and time-consuming and demands an extraordinary amount of patience as partners plan, act, reflect, amend and renew their work. It also involves ensuring that the partnership has a long-term impact and benefits for EQUAL target groups; partner organisations and the EQUAL programme itself.

In order to build successful EQUAL Partnerships the following factors are of crucial importance:

Inclusivity

Getting the engagement and participation of all partners through the involvement of their different contributions to the project work; establishing good working relationships with EQUAL Managing Authorities and National Support Structures and making sure that beneficiaries are consulted and engaged in the work of the partnership.

Openness and clarity

Allowing ideas to come forward through dialogue, discussion and creative learning processes. Ensuring that the partnership has clear goals and transparent structures and processes that encourage partners, beneficiaries and wider stakeholders to engage with them.

Giving time

Allowing plenty of time for discussion, review and relationship-building with partners, beneficiaries and EQUAL management bodies to help foster mutual respect and understanding – the pre-conditions for trust.

Sharing experience

Central to improving performance and developing more sustainable partnerships is the promotion of an EQUAL Partnership “learning culture” in which both Development and Transnational Partnerships are able to learn from one another. Through open exchanges of experience that share what works, and what does not, partnerships are offered options for replicating and/or adapting successful models and processes in their work. They are also made aware of possible obstacles to partnership-building and how these might be overcome. By building upon existing linkages as well as opening new avenues for establishing and joining wider partnership learning networks and exchanges, the opportunities for enhancing motivation and inspiring other partnerships will provide a lasting and positive impact across the EQUAL programme and beyond.

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EQUAL *The European Thematic Groups*
A close look at the EQUAL Development Partnerships
EQUAL Guide on Transnationality (2001)
EQUAL Conference, Networking for Inclusion

All available at: http://europa.eu.int/comm/employment_social/equal

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Belgium <http://www.fse.be>

France <http://www.equal-france.com>

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Ireland <http://www.equal-ci.ie>
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Equal at Work, Dublin Employment Pact <http://www.dublinpact.ie>

Mudança de Maré <http://www.ajism.org/mm>

RepaNet <http://www.repanet.at>

Other websites

Business Partners for Development <http://www.bpdws.org>

The Copenhagen Centre <http://www.copenhagencentre.org/main>

International Business Leaders Forum <http://www.iblf.org>

Innovation Through Partnership <http://innovation-partnerships.org>

LEDA Partenariat <http://www.leda-partenariat.org>

Partnership Brokers <http://www.partnershipbrokers.net>

Renewal.net <http://www.renewal.net>

APPENDICES

APPENDIX 1: SELECTED DEVELOPMENT PARTNERSHIPS

APPENDIX 2: PROJECT METHODOLOGY

APPENDIX 1: SELECTED DEVELOPMENT PARTNERSHIPS

COUNTRIES	Austria RepaNet	Belgium Décrire	France De la précarité à l'emploi durable	Ireland Dublin Employment Pact	Ireland Sonas DP Ltd	Portugal Públicos Diferentes. Iguais Oportunidades	Sweden Diversity in Västernorrland	UK JIVE (Joint Interventions) PARTNERS
EQUAL Pillar								
Employability			X			X	X	
Entrepreneurship	X		X					
Adaptability		X	X	X				
Equal Opps. Gender								X
Asylum seekers					X			
No. of members								
1 to 4		X						
5 to 10			X		X	X		X
11 to 20	X						X	X
20+				X				
Sectors from which members are drawn								
Private		X		X			X	
Public	X	X		X	X	X	X	X
NGO	X		X	X	X		X	X
Social	X	X		X	X		X	X
Other				X		X		
Wider Linkages								
	X	X	X	X	X	X	X	X

APPENDIX 2: PROJECT METHODOLOGY

Learning material for the project was collected through the following methods:

Research into partnership resource materials

Relevant materials from EQUAL and the 8 DPs, as well as other sources, were used to ascertain what key issues and themes were important to explore during the project. This process also enabled the identification of key supporting resources for EQUAL partnerships.

Introductory Meeting

At the start of the project a meeting was held to enable the DP representatives involved to meet and obtain a clear idea of the project and what would be expected of them. A preliminary learning exercise to identify key issues at the first three stages of the Partnership Learning Cycle was carried out and ground rules established for working together virtually.

E-learning network

An e-learning network was established with the DPs. This involved each of them identifying a key issue or challenge faced at different stages of the learning cycle, outlining how it was approached and stating what worked and/or what did not and why they thought that this was so. This material was summarised and shared on a fortnightly basis.

Questionnaire

A questionnaire was used to examine how the selected DPs dealt with key issues during their work. Responses were followed up with telephone conversations to explore particular issues with each partnership individually.

Partnership Workshop

A workshop was held in which the DPs discussed and reflected upon the learning and carried out a series of group exercises to identify skills needed for partnership-building, explore innovative approaches to key challenges and suggest tips for other EQUAL partnerships.